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Implementing  
The  
Boston Teachers'  
Contract

*Process Is Generally Successful But Key  
Opportunities Missed*

*March 2002*

**Research Bureau**

In collaboration with the Massachusetts Advocacy Center



## EXECUTIVE SUMMARY

The Boston Public School System (BPS) has made important progress in its recruitment, hiring and transfer efforts in the implementation of the first year of the new \$130 million contract with the Boston Teachers Union (BTU). Before this contract, a common complaint among Boston's school leaders was the lack of flexibility to assemble their own teaching staff on a timely basis. The most widespread effect of the contract was the ability of principals to protect and hire first year provisional teachers who previously could be "bumped" from their jobs by permanent teachers transferring into these positions. Top BPS operations managers were committed to fully implement the hiring and transfer provisions of the teachers' contract. With considerable effort, the universal posting of all vacancies on March 1 for internal and external candidates was met, as were the May 1 posting and subsequent deadlines. This was a significant achievement. Principals and headmasters made important progress in meeting the budget and earlier interview and selection deadlines. An interim information system was created to provide data electronically to principals and central administrators to facilitate the staffing process. Being able to compress the teacher assignment timetable to enable staffing decisions to be made sooner allowed Boston to be more competitive with the suburban systems in hiring strong teaching candidates. The cooperative working relationship between the BPS and the BTU was important in meeting these benchmarks. The financial challenges facing the BPS next year make it even more important that the focus be kept on implementing the full benefits of the transfer and hiring opportunities in the contract.

While progress was achieved, principals and headmasters did not take full advantage of provisions in the contract that enabled schools to interview and hire outside candidates much earlier in the process. Moreover, focusing its efforts on meeting the March 1 and subsequent staff postings, the BPS's Office of Human Resources (HR) did not establish a plan to capture data that are essential to evaluate, manage, and prepare for this year's second round of implementation and for negotiations next year to improve the teacher hiring and transfer processes in the future. The complexity of information required to process thousands of transfer and application requests and make hiring decisions in a short timeframe could not be supported by the existing city management information systems.

The Superintendent should make personnel management a high priority so that recruitment, hiring, and transfers are viewed as an integral part of improving teaching and learning in the classrooms. For the staffing process now underway for the next school year, principals should take greater advantage of the early hiring opportunities authorized in the teachers' contract. An applicant tracking system should be instituted to meet the BPS's extensive personnel management needs. A data management plan should be established to capture relevant information to manage and evaluate the hiring and transfer processes. The contract still keeps seniority at the core of both the transfer and excess pool bidding processes. Seniority will have more of an impact in preparing for the 2002-2003 school year as budget cuts may necessitate layoffs. In that event, more teachers will turn to the excess pool process to secure positions in the schools, thereby limiting the schools' ability to recruit outside the BPS. Even so, over 250 teachers from outside the BPS are expected to be hired, to fill open positions before September. The BPS should be prepared to

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fully utilize the contract to recruit and hire new teachers this spring, especially for critical needs positions in math and the sciences that will not be filled by permanent BPS teachers.

There are few actions more critical to improving the quality of education in the public schools than hiring the best staff available. As the BPS is working on its staffing and budget planning for the 2002-2003 school year, it is timely to assess the successes and weaknesses in its hiring process last year. The Research Bureau prepared this report in collaboration with the Massachusetts Advocacy Center (MAC) as part of our ongoing monitoring of the contract implementation.

## CONTRACT OBJECTIVES

In 2000, Boston witnessed a unique coalition of business, parent, church, community and education advocacy organizations coming together in Boston United for Children to strengthen vital provisions in the new BPS teachers' contract. The crucial goal that all shared was the increased ability of the BPS to hire applicants from inside or outside the school system for any vacancy early enough so that Boston could compete with the suburbs in attracting the best teachers available for the students. Other key goals included more flexible scheduling of the school day, expanded staff development for teachers and reduced class size. Given the estimates that Boston will have to replace over half its teaching force in the next five years due to increased retirements, the ability to recruit and hire the best candidates is a critical element in improving the quality of education in the public schools. Retention then becomes an equally important issue. Additional concerns, particularly of the Voices for Children coalition members, involved increased access by parents to schools and teachers, and improved training for the members of the School Site Councils.

### KEY HIRING AND TRANSFER CONTRACT PROVISIONS

The new BPS teachers' contract includes initiatives that should improve student academic achievement in Boston if fully implemented. The teachers' assignment timetable is compressed and the process opened up to facilitate staffing decisions being made sooner with more opportunity to recruit outside candidates. Changes in the contract should enable the number of transfer applicants to be reduced, limiting school disruption and easing administrative burden and delay. A few key hiring and transfer changes in the contract are listed below.

- The hiring and transfer process to fill teaching vacancies is opened to all internal and external candidates on March 1. For outside candidates, this change starts the hiring process three months earlier than allowed in the past.
- For the first time, principals can protect first year provisional teachers from being "bumped" from their jobs by permanent teachers and can hire these provisionals immediately in March.
- Improved performance evaluation requirements and a prohibition on voluntary excessing ~~allow reduction in the number of teachers entering the excess pool and an improvement~~ in the quality of the teachers in the pool.
- Principals and School Site Councils have the opportunity to interview and hire teachers much earlier than in previous years.





During 2000, the coalition waged a vigorous campaign particularly over the issue of increased hiring flexibility through changes in teacher transfer and reassignment seniority rights. A strike was threatened and narrowly averted, and a contract was signed only after the school year started in the fall of 2000. The final provisions of the contract did not go as far as the coalition recommended, but the contract does contain important reforms in a number of areas at an estimated cost of \$130 million over three years.

## IMPLEMENTATION PROCESS

Under the leadership of the Chief Operating Officer (COO) and the Director of the Office of Human Resources, the BPS moved aggressively to implement the earlier timetable and hiring provisions of the contract. The COO convened a management “SWAT Team” of senior personnel, technology, and budget staff who met almost bi-weekly. The team established a tight implementation timetable and devised strategies to overcome initial hurdles and other problems as they were identified. The following key steps were taken:

- A “universal open posting” announcing all job openings was completed on March 1 and made available to internal and external candidates through the BPS’s Web site for the first time. Subsequent or remaining job openings were listed in five additional postings from May 1 to August 7. After completion of the final posting process, principals acted to fill remaining vacancies in order to open school in September. Previously, school principals and Personnel Sub-Committees could not start to interview and recruit teaching candidates until after June 1.
- The teacher transfer process that previously had taken three months was compressed into four weeks. Although HR had been restructured with additional staff, basic personnel decisions were still made by a small number of employees. Under stressful conditions, these employees had the responsibility to work with all of the BPS’s 132 principals and headmasters to insure that the proper staffing decisions would be made in the limited timeframe.
- An interim computerized staffing system (PDIS) was created by the BPS’s Office of Information Systems (OIS) to integrate budget and personnel data electronically and give principals the ability to develop “future year scenarios” regarding personnel transactions for planning purposes before final decisions were made. This system allowed principals and central managers to match eligible candidates with open budgeted positions. Without this hybrid system, none of the benchmark dates would have been met successfully. The City’s integrated financial and HR system (Boston Administrative Information Systems or BAIS) does not have the capability to create future year scenarios that is needed by the BPS to manage the complexity of its staffing process efficiently.
- Principal and School Site Council Personnel Subcommittee training was developed by HR jointly with the BTU to instruct the principals and committee members in the new hiring procedures. Most principals received training but only a few Personnel Subcommittee members actually were trained in the joint BPS-BTU process.





## THE INITIAL RESULTS

Reporting on the initial results of the transfer and hiring process and evaluating change over the past year is restricted at this time due to the limited amount of meaningful data from HR on last year's experience. HR is working with OIS now to extract and compile data that is still available to enable an analysis to be developed that can improve this year's transfer, recruitment and hiring procedures. The Bureau, with MAC, will issue a second report once the information is compiled and analyzed. That report should include a more complete assessment of the results and how they compare with the prior year. Based on current information, the following points can be made:

- The BPS filled approximately 1,181 open positions before school began in the fall of 2001, including late retirements and resignations. Overall, HR processed over 35,000 resumes for specific jobs in individual schools due to applicants applying to multiple vacancies.
- Before the March 1 posting of vacancies, 184 provisional teachers were approved for permanent appointment. Included in this group were 87 first-year provisional teachers. This action was taken even though options were available to retain these teachers without granting early tenure.
- New teachers totaling 648 were hired to fill the 1,181 vacancies. These positions were filled by either candidates from outside the Boston school system or from substitute teachers or paraprofessionals from inside the system. These 648 new teachers represent 54.8% of total openings filled.
- On March 1, the BPS posted 710 vacant teaching positions on its Web site, a BPS first. Of these vacancies, 380 or 53.5% were filled by provisional teachers, including 131 first-year provisionals. Schools hired 25 teachers from outside the system for special positions through open postings. Only 52 permanent teachers received jobs through the transfer process and only 41 positions had to be filled through the excess pool reassignment process. Thus, out of approximately 4,700 BPS teachers last year, only 93 or 1.9% received jobs through the transfer and excess pool processes that restrict schools from selecting those candidates from inside or outside of the BPS whom they felt were most suited to their educational reform strategies.
- A total of 362 BPS teachers left the School Department by September 1, 2001. Of that total, 168 teachers resigned and 194 teachers announced their retirement, of which 82 were due to teachers taking advantage of the state's teacher early retirement incentive plan. Last year, only a total of 76 teachers retired. Despite requests for early notice of intent to retire to allow for adequate planning time, too many teachers waited and informed the School Department during the late summer and even after school had opened.
- One unintended consequence of the new contract provisions was that more transfers of permanent and provisional teachers occurred after the May 1 posting. After five postings on the BPS's Web site from May 1 to August 7, additional vacancies were created due to promotional changes, leaves of absence, or retirements to which both permanent and



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provisional teachers applied. After the end of June when school staffing was basically completed, these additional transfers by BPS teachers created considerable disruption of school staffing and added administrative burdens. Of note is that the 52 teachers who transferred to other positions earlier in the process remained in those positions and were not allowed to “double jump.”

## MISSED AND FUTURE OPPORTUNITIES

Boston schools made important progress in hiring more teachers earlier this year. Almost uniformly, principals who responded to a survey reported that they were better informed and that the hiring process proceeded much better this year than in previous years. Principals and headmasters did meet the budget submission deadline, and they made important progress in meeting the earlier interview and selection deadlines.

Nevertheless, a larger number of teachers could have been hired even earlier, and the system could have been opened up more extensively to candidates outside the BPS if the new contract procedures had been fully implemented. BPS principals did not take full advantage of hiring as many outside teachers as early as was possible under the new contract. One of the contract innovations, with the “universal open posting” of all jobs on March 1, was to allow principals to interview candidates for any vacancy immediately during the months of March and April. Then, if no permanent BPS teacher either transferred or was reassigned into the position by May 1, the outside candidates could be hired immediately. In practice this year, few principals took advantage of the opportunity to interview outside candidates in March and April. There were 121 vacancies announced on March 1 that were still open on May 1, and only a negligible number of these positions were filled right away.

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In practice, schools did not open up competition for jobs to as many outside candidates as was possible under the new contract. Many principals used the new contract authority to hire first year provisional teachers whom they knew in their schools, rather than wait to see if there would be better candidates applying for the jobs from outside the system. Arguments in support of this decision were that the principals had seen the provisional teachers in action, that they had received training in the literacy or math or other special initiatives in the school, and they were already an integral part of the school's education team. However, as a residue from the past, principals may have hired a “bird in the hand,” not because they thought the person was the best but because they did not trust the school system's ability to recruit better candidates for the job. In fact, HR, which had been reorganized and its recruitment staff quadrupled, had successfully implemented a much more aggressive outreach strategy.

Finally, last year principals chose to give 184 provisional teachers, including 87 first-year provisionals, permanent appointments. Under the contract, rather than grant early tenure to provisional teachers, principals could have taken more time to review the performance of their teachers before deciding on tenure by offering Letters of Reasonable Assurance to protect the provisional teachers in their current positions.



## RECOMMENDATIONS

The BPS made important gains in hiring under the new contract, but there are several steps that should be taken now that could significantly improve the implementation of the transfer and hiring procedures in the second year of the contract.

- **SUPERINTENDENT SHOULD GIVE HIGH PRIORITY TO PERSONNEL MANAGEMENT.** The Superintendent and the Deputy Superintendents should make personnel management a high priority so that the issues of transfers, recruitment and hiring are viewed as an integral part of improving teaching and learning in the classrooms. This priority is no less important in times of fiscal retrenchment. The Superintendent and the COO need to insure not only that HR, but that all parts of the school system recognize that they have an opportunity and also a responsibility to take full advantage of the new contract opportunities to select the best teaching staff. Implementation of the hiring procedures in the new contract should be highlighted in principal orientation, reinforced in principal training throughout the year, and should be a key part of the checklist used by Deputies and Cluster Leaders in their work with school leaders.
- **COMPREHENSIVE HUMAN RESOURCES DATA MANAGEMENT PLAN.** HR, in collaboration with the Budget Office and OIS, should establish a data management plan that would gather data on a timely basis to facilitate the management and evaluation of the hiring and transfer processes. During this first year, the priority focus was on meeting the March 1 and subsequent benchmarks, and there was no plan in place to capture necessary data. Consequently, basic information that could help senior administrators manage the process and evaluate its impact for the next year was simply not available. This situation should be rectified before the next hiring cycle. Recruitment, transfer, application and hiring forms should be reviewed to insure that all needed data is captured. Proposals specifying these data needs have been prepared, and HR has indicated that it will identify what information can be retrieved from last year's process. For this year, it is essential that senior personnel, budget, and technology managers adopt a comprehensive data management plan that can be made operational by the first posting deadline in 2002. The plan should include an adequate budget and staffing for OIS to plan and retrieve the data.
- **EARLY HIRING OPPORTUNITIES.** Principals should make more of an effort to take advantage of the early hiring opportunities authorized in the new contract to select their teaching team. Principals are constantly overwhelmed with demands on their time; yet there are few actions more important than hiring the best teaching staff available to improve the educational system for the students. With increasing retirements over the next years, taking advantage of these early hiring opportunities so that Boston can compete effectively with suburban districts that offer jobs early in the year will be even more important. With the ability now to protect first year provisionals, principals should be judicious in requesting that provisional teachers be granted permanent status. The BPS is expected to hire over 250 teachers from outside





the system to fill open positions before September. The principals, working with HR, should be prepared to fully utilize the contract to recruit and hire new teachers this spring, especially for critical needs positions in math and the sciences that will not be filled by permanent BPS teachers.

- **SELECT A NEW APPLICANT TRACKING SYSTEM.** To meet effectively the timeline demands of the new teachers' contract for transfer and hiring decisions, the BPS should institute a new applicant tracking system as part of the city's integrated financial and HR system. The BPS has 132 public schools and receives applications from approximately 10,000 people each year. HR has experienced problems managing data regarding its employees as well as its applicants for vacant positions. The City's current integrated financial and HR system cannot adequately meet the BPS's extensive personnel management needs with the numerous applications that must be processed in a short time. Based on a request for proposals for purchase of a computerized applicant tracking system, the BPS has recommended a vendor to provide the software. The Menino Administration will need to determine whether the expected Version 8 upgrade of its current system, with some necessary customizing, will provide most of what the BPS seeks, is user friendly and cost efficient. Whatever the final decision, the proposed fiscal 2003 budget should provide for a new applicant tracking system that will facilitate the effective execution of recruitment, hiring, and transfer decisions in the 2003-2004 school year.
- **ASSESS EFFECTIVENESS OF THE OFFICE OF HUMAN RESOURCES STAFFING.** The Office of HR should continue its efforts to improve its recruitment and staffing capacity by cross training its staff to ease the burden during crunch time. Key existing HR employees were stretched beyond reasonable expectations to meet the new contract timetable. They did it, but this approach is not sustainable over the long run. Too many essential tasks depend on two or three people working in a shorter time frame. Better use of cross training will help insure that HR will meet the timelines to make Boston competitive with surrounding school districts. Maintaining current staff capacity should be a BPS budget priority.
- **STRENGTHEN ORIENTATION AND TRAINING.** Central administrators and Deputies, the principals and headmasters, and the School Site Council Personnel Subcommittees all need to be trained more effectively to insure that they fulfill their responsibilities in implementing the new contract. The HR Office and the leadership of the BTU designed an excellent training package and steps need to be instituted to insure that school administrators and Subcommittee members are trained. Principals are overwhelmed with responsibilities and directives during that time of the school year and, consequently, implementation of the contract procedures was very uneven.
- **LIMIT POST JUNE TRANSFERS.** The BPS and BTU should discuss how to limit teacher transfers to vacancies created after school staffing is set by the end of June. Filling these openings through internal transfers creates disruption of school staffing and added administrative burden.



## CONCLUSION

The second year of implementing the teachers' contract will create new challenges for the BPS, but it should not lessen the importance of keeping the focus on managing the hiring and transfer processes so that more schools take full advantage of the opportunities in the contract. Last year's process took place in a period of budget growth with the emphasis on hiring new teachers and with relatively few transfers made through the excess pool. In the second year, the BPS faces the prospect of a reduced budget. That situation may result in layoffs that will cause the excess pool process to play a larger role in personnel assignments and limit opportunities to reach outside the system for teachers. It is all the more important that the BPS takes advantage of those opportunities that do exist for earlier hiring of the best candidates available.





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